

# Electric Forklift Program Application

## DOCUMENTS LISTED BELOW MUST BE SUBMITTED WITH THIS APPLICATION

- W-9 Form for Company requesting incentive.
- Copy of invoice or sales contract indicating: cost of electric forklift(s), make and model number, serial number, purchase or lease date, lease term.
- Copy of electric forklift technical specifications: manufacturer, model number, model year, class, charger type, and lifting capacity.
- Photograph of the electric forklifts at the place of business.

## CUSTOMER INFORMATION

SMUD account number (located on SMUD bill):	Federal Employer ID Number:	
SMUD account holder name (business account name on SMUD bill):		
SMUD account address where electric forklifts are operated:		
Mailing address for customer incentive payment (if different than above):		
Contact name:	Phone number:	Email address:
Lease or Purchase Date:		Lease term (3 year minimum), if applicable:

Forklift Type	Quantity	Total Customer Incentive	Serial Number(s)
Class I		(Qty.) X \$500 =	
Class II		(Qty.) X \$500 =	
Class III		(Qty.) X \$500 =	
Skid Steers		(Qty.) X \$500 =	

## SMUD'S INCENTIVE REQUIREMENTS AND CUSTOMER ACKNOWLEDGEMENTS

To be considered, this application must be completed with all requested information and all supporting documentation attached. Only new Class I, Class II, and Class III electric forklifts or skid steers purchased or leased (3 year minimum) are eligible for this incentive.

I certify that the information provided in this form and attached documentation is true and accurate to the best of my knowledge. I have read, understand, and agree to the terms and conditions set forth by SMUD and listed on the front and back of this application form. Signatory on this application certifies that he/she is authorized to apply for this incentive by the business entity named on this application form.

\_\_\_\_\_  
Printed Name of Authorized Customer Representative

\_\_\_\_\_  
Authorized Customer Representative's Signature

\_\_\_\_\_  
Date

## SMUD USE ONLY

Description: Electric Forklift Incentive	Amount PD	GL Account	Order
Approved (print name)	Approved signature		



## Directions for Completing the Electric Forklift Program Application

1. Read the Terms and Conditions set forth in this Application.
2. Ensure all information provided on page one is correct and legible. An authorized representative for the SMUD customer of record (the customer/company named on the SMUD bill) must sign the application. An incomplete application will be returned to the contact named on the application.
3. Attach all the required supporting documentation specified on page one of his application.
4. Email the completed and signed application package within 90 days of the electric forklift and/or skid steer purchase/lease date to CommercialEV@smud.org.

## Electric Forklift Program Application Terms and Conditions

1. Effective date of this program is January 1, 2021. Only electric forklifts or skid steers purchased or leased on or after this date, as identified by the sales contract attached to the application, are eligible.
2. Customer must be a SMUD commercial customer who is in good standing, and the electric forklifts and/or skid steers under this incentive application must be operated for a minimum of three years at a commercial address with an active meter receiving SMUD electric service.
3. The incentive is available for the purchase or lease of a new Class I, Class II, or Class III electric forklift, or for an electric skid steer. If leased, the terms must be for a minimum of three years. Up to 20 electric forklifts and up to 20 skid steers are eligible for an incentive per property.
4. The incentive payment will be mailed within 8 to 12 weeks subsequent to receiving all required documentation. Applications are processed on a first-come, first-served basis, and incentive is subject to availability of funds. SMUD's processing of this Application may be placed on hold or automatically rejected if applicable Program funds have been exhausted.
5. SMUD expressly reserves the right to modify or terminate the program, in whole or in part, at any time and for any reason without prior notice.
6. Customer agrees to maintain the electric forklift and to promptly repair any non-or under-performing forklifts.
7. A complete incentive application package must be postmarked within 90 days of the electric forklift and/or skid steer purchase/lease date as indicated on the sales or lease contract submitted with this incentive application. Applications are not considered to be received until all required documentation is completed and received by SMUD. Failure to provide all of the required documentation by this date may result in incentive ineligibility.
8. The customer incentive payment shall go directly to, and in the name of, the customer/business name/account holder named on the SMUD bill. Payments cannot be assigned or transferred.
9. Customer agrees that SMUD reserves the right to request additional documentation prior to incentive payment. The incentive payment may be denied by SMUD if this condition is not met by the customer.
10. Customer shall cooperate with SMUD or its authorized representative in performing evaluation, measurement, and verification (EM&V) of the Program. Information accessed for EM&V may include, but is not limited to functioning hour meter displays, onsite verification of installation and operation, program compliance, battery charging equipment and observation of battery charging-related facility operations, and Project records. All information collected will be held confidentially and will be used by SMUD or its authorized representative for Program analysis purposes only. Customer shall ensure that SMUD or its authorized agents have access to the Company's facility at reasonable times, for a period of up to five (5) years from the date of the Company's receipt of incentive payment under this agreement.
11. **Disclaimer of Warranties:** SMUD makes no representations, expressed or implied, regarding the design, construction, reliability, efficiency, performance, operation, maintenance, or use of any equipment, or installation discussed, selected, rejected, purchased, or otherwise considered by customer. Any decisions regarding the selection, design, purchase, installation, use and operation of any equipment or consideration or selection of any contractor shall be at the sole responsibility of the customer.
12. **Customer shall indemnify,** defend, and hold harmless SMUD, its directors, officers, agents, and employees against all claims, loss, damage, expense, and liability asserted or incurred by other parties, including but not limited to SMUD's employees, arising out of or in any way connected with the incentive payment and caused by the acts, omissions, intent or negligence, whether active or passive, of customer, its agents, employees, and suppliers, and excepting only such loss, damage, or liability as may be caused by the intentional act or sole negligence of SMUD.
13. These terms and Conditions apply for all incentive application packages submitted/postmarked on or after October 1, 2020 and subsequent. If Customer fails to comply with any of these Terms and Conditions, as determined by SMUD, Customer agrees to repay the incentive in an amount determined by SMUD within 30 days of written notice by SMUD.

